CD FY10 Budget and Tactical Plan Review

FY10 Tactical Plans for
[Topical Area]

Tactical plan names listed here…	DocDB#

[Presenter's Name]

[Date]

FY10 Tactical Plan for *[Level 0/1 Activity name]*

- Tactical Plan Leader: [Insert Name]

Service Activity List
- ***Service Activity 1****
- Service Activity 2
- ***Service Activity 3****
- ***...***

Project Activity List
- Project Activity 1
- ***Project Activity 2****
- Project Activity 3
- ...

Note:
- Adjust this slide as needed to fit activities in one (preferred) or two slides.
- *** Identify which Level 2 activities** are described in detail in the Service Activity or Project slides.
- Your call – prepare a Service or Project Activity slide for:
  - Big activities (SWF or M&S)
  - Important activities (strategic or highly visible)
  - Underfunded activities (make the case for benefits/costs provided)

Service Activity: [insert name]
(1 slide per <u>service</u> activity in the Tactical Plan)

- Goals Related to this Activity [from Tactical Plan]
  - 1. Goal 1
    - [Identify if new or existing goal, and relative priority. Indicate status or priority in separate color/fonts.]
  - 2. Goal 2
    - [Identify if new or existing goal, and relative priority. Indicate status or priority in separate color/fonts.]
  - 3. Goal 3
    - [Identify if new or existing goal, and relative priority. Indicate status or priority in separate color/fonts.]

- Key Metrics
  - [List key metrics and/or service levels here…]
    - What is it? (tickets clear per month, service uptime, service request response time,…)
    - Goal level – planned vs actual. (and how level is measured, by whom)
    - Impact high or low, felt by whom, if level not met
  - [URL of online presentation of metrics]
  - Milestones, if any applicable (may be none for some Service Activities)

- Service Documentation: Location of a Service Definition and related documentation

- Issues and Risks (specific to this activity, includes allocation impact)
  1. List Issues and Risks…

Project Activity: [insert name]
(1 slide per <u>project</u> activity in the Tactical Plan)

- Goals Related to this Activity [from Tactical Plan]
    - 1. Goal 1
        - [Identify if new or existing goal, and relative priority. Indicate status or priority in separate color/fonts.]
    - 2. Goal 2
        - [Identify if new or existing goal, and relative priority. Indicate status or priority in separate color/fonts.]
    - 3. Goal 3
        - [Identify if new or existing goal, and relative priority. Indicate status or priority in separate color/fonts.]

- Key Milestones
    - [List key milestones and associated deliverables here…]
        - What is it? (in particular, list milestones visible to customers, such as when deliverables become available.)
        - When – planned vs actual. (at least quarter-year granularity)
        - Impact high or low, and felt by whom, if date not met.
    - [URL that shows project progress towards milestones]
    - Metrics, if any applicable (may be none for some Project Activities)

- Project Documentation: URL to Project Web Site or project definition documentation

- Issues and Risks (specific to this activity, includes allocation impact)
    1. List Issues and Risks…

Ripple Effect on Shared IT Services
(What new requirements does your service have for other services)

Activity Level 2	Network Connectivity: Expanded Service	<--	Network-Attached Storage: Add Space	<--	Shared IT Service 3	<--
ZY Computing Support			~10 TB	AMS		
Solar Wind Upgrade	New cable run	AMP				
DES			20-150 TB	ATS		
JDEM	Increased bandwidth	ATS				
Pierre Auger			X	N?S		

- Discussion of your service's new needs...

Note: Help avoid emergency procurements, which incur added costs.
At least put an 'X' where need is expected, even if details are not yet known.

← Descriptors: Agreed to?   Whose budget covers costs?   Is the driver a service or a project?
A = Agreed with service provider;   N = New need, not yet agreed to by service provider.
M = "My" budget contains this;   T = Shared service budget should contain this.
S = Steady-state service drives this; P = Project activity alone drives this.

Only activities with "new" demands on shared IT services since last FY need be listed.
   * Network Connectivity: expansion of existing service
   * Network-Attached Storage a.k.a. BlueArc: additional storage space

FY10 FTE and M&S: Request vs. Allocation

Level 0/1 Activity: *[Level 0/1 Activity name]*

Note: *Table uses embedded spreadsheet. Numbers and some names are pure fiction.*

Activity Level 2	Project or Service	Project Priority	FY10 FTE Request At Activity Level 2	FY10 M&S Request At Activity Level 2	FY10 FTE Allocation At Activity Level 2	FY10 M&S Allocation At Activity Level 2
ZY Computing Support	Service	---	0.15	0	0.15	0
Solar Wind Upgrade	Project	Low	0.2	0	0.2	0
DES	Project	High	4.57	154,507	4.57	150,607
JDEM	Project	Medium	4	56,600	4	38,808
Pierre Auger	Project	High	0.25	3,500	0.25	2,030
Total			9.17	$214,607	9.17	$191,445

- Discussion of above...

Project Priorities:

High = Already committed to stakeholders to meet identified demands.

Medium = Provisioning for planned stakeholder demands, especially demand coming in near-term.

Low = Exploration to prepare for anticipated demand, especially demand coming in long-term.

If you wish to raise a priority beyond these definitions, please make your case in the Discussion.

Impact of Preliminary Allocation

- Able to accomplish core mission...

- Unable to...

Note: Use this slide to address impact of tentative allocation on ability to meet CD mission, strategic goals, or tactical plan goals and objectives.

Summary of Past Action Items

- ## Action Item 1
  - Description...
  - State: Closed

- ## Action Item 2
  - Description...
  - State: Moot at this time. Ready to Close

- ## Action Item 3
  - Description...
  - State: Open

> **Note:** FY09 Action Items are listed in DocDB 2937 Provide a terse update in slide. Eg. those items to be dealt with in FY10 tactical plans: were they?
>
> Only *speak* to those items which have significant impact on your plan and/or budget request.

Tactical Plan Summary

- Summary

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Note:
Free-form, but be brief to fit in time allotment...
Can review highlights, issues, and risks at highest level...

</div>

- [Please feel free to include slides to show the accomplishments associated with these Tactical Plans: pictures, plots, checked-off plans, customer/experiment achievements, etc.]

(Overall Guidance: *not part of the presentation)*

- If a presentation covers more than one tactical plan, please cover each tactical plan with its own slides 2-9 and one overall title slide 1.
- See DocDB # 3272 and 3278 for activity naming scheme for FY10.
- Support material at: Projects & Services page (FY10 planning section)

- Activity = Activity Level 2 or lower explicitly listed in Tactical Plan
- Activities are classified in Tactical Plan as Project-like or Service-like
  - Projects: finite defined lifetime, defined deliverable. Includes R&D work.
    - A.k.a Upgrades, …
  - Services: same operation or task repeatedly.
    - A.k.a. Operations, Maintenance, Support, …
- Terminology you may come across...
  - Obligation Budget: Allocated budget. This may differ from the budget request.
  - YTD Obligations: Fully incurred expenses. Does not include RIPs, Req.s in CD, etc.
  - Current FY10 Forecast: Estimate of all obligations to be incurred by the end of FY10.
  - M&S: Equipment + Operating. Operating includes Travel, Material Purchases, Professional Services (contractors), Maintenance (licenses), and Other.
  - RIP: Requisitions in Progress

(Budget and Tactical Plan Schedule)

- ## High-Level Schedule (: ***DRAFT***... Some topic areas by day)

  - Tue Sep 29, 12:30pm – 5:00pm: Central IT Services, CPTA
    - Mark K: Sep 29 is Security Awareness Day, impacts Central IT Svcs.
    - Rob K: We will swap days for Central IT Services then....
  - Thu Oct 1, 12:30pm – 5:00pm: Enterprise/Info Sys, Networks
  - Fri   Oct 2, 12:30pm – 5:00pm: Grid, CMS
  - Tue Oct 6, 12:30pm – 5:00pm: Run2, Neutrino, Astro, SCF.1
  - Thu Oct 8, 12:30pm – 5:00pm: Org Support, SCF.2

- ## Detailed Schedule and Times

  - To be posted this afternoon on Projects & Services page (see the FY10 planning section)
  - Early next week: to be setup in DocDB similar to last year's FY09 Review event page.